T O U R I S M

TOURISM MONITOR MANUAL

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

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TOURISM MONITOR MANUAL

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The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

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PREFACE

Between July 1, 1987 and June 30, 1988 a Vancouver Island Tourism Monitor was conducted on the tourism activity of Vancouver Island and the Gulf Islands. The survey examined visitor trends and industry performance, reporting on a quarterly basis.

The objective was to produce data and this manual that would be relevant to destination area markets and local decision-making, with specific emphasis on the seasonal changes and a fast turn around of the results. By the end of the twelve month period 8,307 visitor party surveys and 331 business responses had been analyzed and reported over four quarters. This was a major accomplishment and could only be achieved through the cooperation and coordination of the island's tourism industry. It was truly an INDUSTRY-DRIVEN DATA GATHERING PROCESS.

One important benefit of a local data base is that it can be compared to the regularly produced data analyses provided by the province on a tourism region basis. The timing of the VITM was good, in the sense that its results could be compared with a provincial survey conducted during the summer of 1987. The comparison showed that such an industry-driven survey, operating at local levels, could produce reliable data.

Industry assistance was absolutely necessary at all stages of the project. The visitor data was gathered via a

series of survey boxes located in a variety of tourism establishments and attractions. A sample of tourism establishments was needed to provide the industry's performance statistics, which were used to check on the visitor data and provide a complete picture of the tourism activity. The local associations were needed in terms of the visitor survey and to distribute the quarterly results to members, local media and politicians, and any other interested parties.

Coordinating this activity was Dr. Peter E. Murphy, of the Department of Geography, University of Victoria. Dr. Murphy and his students handled the distribution and analyses of the surveys. The results were sent to the Ministry of Tourism and Provincial Secretary, to the regional association (Tourist Association of Vancouver Island), to local associations (like Tourism Victoria), and to the prime contributors.

It is the experience of the Vancouver Island Tourism Monitor (VITM), its successes and problems, which has been drawn upon to produce this TOURISM MONITOR MANUAL.

HOW TO USE THIS MANUAL

This manual is designed to take you through the construction and operation of a twelve-month tourism monitor which examines the demand side (visitors) and supply side (industry) performances in your tourism region. It is based on the Vancouver Island Tourism Monitor (VITM) experience, but as each tourism region will differ in make-up and market, each monitor should be tailored to meet local conditions. Therefore, read this manual through as a book, then tailor the process to suit your needs.

The manual is divided into six major parts.

PART ONE - Introduces the monitor concept, the objectives it attempts to meet, and its requirements.

PART TWO - Explains the procedural steps needed to construct and operate a tourism monitor.

PART THREE - Explains the coding and analysis processes.

PART FOUR - Describes the reporting procedure and distribution of results.

PART FIVE - Provides a tentative budget guide.

PART SIX - Summary and Recommendations.

PART ONE

INTRODUCTION

1.1 WHAT IS A MONITOR?

A tourism monitor is a survey which takes the industry's performance pulse via visitor and industry surveys. It provides a data base that can be used to guide marketing and planning decisions.

1.2 OBJECTIVES AND ADVANTAGES OF REGIONAL TOURISM MONITORS

The objectives of a regional tourism monitor are to provide local data on tourism trends that can be used by local tourism associations and businesses as a supplement to the more general provincial surveys and reports. It is designed to be "industry-driven", in that it is tailored to local needs and basically operated by the local industry. This minimizes the need for specialised research staff and keeps costs down. Its major advantages are that it provides data at a more localized level, reveals trends over a twelve month period, and produces data in a short time frame (within a month).

1.3 MONITOR REQUIREMENTS

a) Breakdown of each provincial tourism region into appropriate local units.

The region should be broken down into local tourism areas which are small enough to reveal local distinctions and trends within the region, yet large enough to be meaningful

and manageable divisions. These could be regional districts, as used in the VITM.

b) The definition of a visitor should be modified to reflect the smaller scale of enquiry.

The conventional (Statistics Canada) break point between local and non-local recreational travel is 80 km (50 mi.). Such a definition would fail to register some recreational travel within a tourism region by local people, for example those travelling to a summer home or ski-hill beyond their town boundaries. The revised definition of a visitor in the VITM was anyone travelling further than 40 kms (25 mi.) from home (see Exhibit 1).

Since the visitor survey involves an unsupervised self-reporting situation for the tourists it is important to include an "origin" question so that the actual distance from home can be calculated. This provides a cross-check of the respondent's visitor status and acceptability into the analysis.

c) To create a comprehensive and cross-checked monitor requires a demand side (visitors) and supply side (industry) survey.

Dual surveys permit cross-checks for reliability. For example, the VITM summer quarter results revealed visitors claiming to spend 2.3 nights in hotels and motels with average party sizes of 2.8. This compared closely with the industry's figures of 2.1 nights and 2.7 people.

d) To uncover trends requires a twelve month monitor.

The VITM revealed seasonal changes in business travel, changes in visitor activities and destination popularity over its twelve month period. These results emerged from the regular quarterly reports, which in the VITM covered the following periods:

Winter Quarter:	January 1 - March 31
Spring Quarter:	April 1 - June 30
Summer Quarter:	July 1 - September 30
Fall Quarter:	October 1 - December 31

A monitor should be flexible and reflect regional conditions. In this regard it is recommended that the selected quarterly divisions reflect local seasonal activity. For example, it may be desirable to represent the summer quarter by a June, July, August combination, necessitating an adjustment of all the other quarters.

e) To facilitate data collection and control costs requires an industry-driven operation.

The prime beneficiaries of the monitor are intended to be the industry and local associations, so it makes sense for them to play a major role in the data collection process. Industry establishments will be needed to collect the visitor data and to respond to the industry performance surveys. In this way it is possible to minimize the cost of hiring professional research staff.

While this may appear to be an additional burden on very busy people, the monitor has been structured to require relatively little direct involvement. For individual

businesses it requires little more than some shelf-space, the mailing of completed questionnaires, and answering a short and simple survey four times a year. In fact the Vancouver Island tourism associations and some businesses felt their involvement did not go far enough, so they offered local prizes to encourage greater visitor participation (see Exhibit 1). It worked!

f) To analyze the data and disseminate the results requires a central clearing house.

To analyze the returned surveys and place the results into the hands of local associations and businesses quickly requires a central clearing house. The clearing house must ensure confidentiality for both visitors and businesses; it must have access to a personal computer and the skills necessary to establish a local research design, enter and analyze the data. It may also be desirable to consider an arms-length clearing house.

The VITM used the services of a post-secondary education establishment, which satisfied all the above criteria.

1.4 PROCEDURAL STEPS

A monitor involves two parallel surveys of the visitors and industry, with several stages to complete the data gathering process. Exhibit 2 illustrates the procedural steps used in the VITM to produce a comprehensive accounting of the industry's performance trends; and this structure has

been used as the basis for this manual. Each procedural step is reported as a separate chapter in this manual.

Exhibit 1

(Instructions and prize information on visitor survey box)

VISITOR SURVEY AND MINI-HOLIDAY PRIZE DRAW

If you are a VISITOR to Vancouver Island or a Vancouver Island RESIDENT TRAVELLING FURTHER THAN 25 MILES/40 KILOMETRES FROM HOME, please help us to serve you better by filling in the questionnaire found in the side pouch. The survey and associated prize draw are open to persons aged 19 years and over. It will take only a few minutes of your time and a completed response will automatically make you eligible for our prize draw (see side panel for details).

Thank you for your participation.

VICTORIA

Holland House Inn
(two nights accommodation for two)

Attractions (complimentary tickets for two):
Royal London Wax Museum, Fable Cottage, Miniature World, Undersea Gardens, Sealand of the Pacific, Classic Car Museum

Causeway Restaurant (dinner for two)

Hertz Rent-A-Car (complimentary car for two days)

CAMPBELL RIVER

Strathcona Park Lodge
(one night accommodation for two including dinner and breakfast)

Complimentary canoe rental (4 Hours)

DUNCAN

Village Green Inn
(two nights accommodation for two)
The Arrangers International Restaurant Ltd.
(dinner for two)

Attractions (complimentary tickets for two):
B.C. Forest Museum, Glass Castle

PORT HARDY

APRIL 1988: Eagle Manor Retreat, Quatsino, B.C.
(dinner, overnight accom. and breakfast for two)
D.H. Timber Towing and Salvage Ltd.,
Coal Harbour, B.C.
(Water Taxi to and from Eagle Manor Retreat)

SEPTEMBER 1988: Glen Lyon Inn, Port Hardy, B.C.
(two nights accommodation for two)

M.V. Gikumi 60' (Killer Whale Watch for two people)

NANAIMO

Tally Ho Island Inns, Nanaimo
(two nights accommodation and breakfast, lunch and dinner for two)

PORT ALBERNI

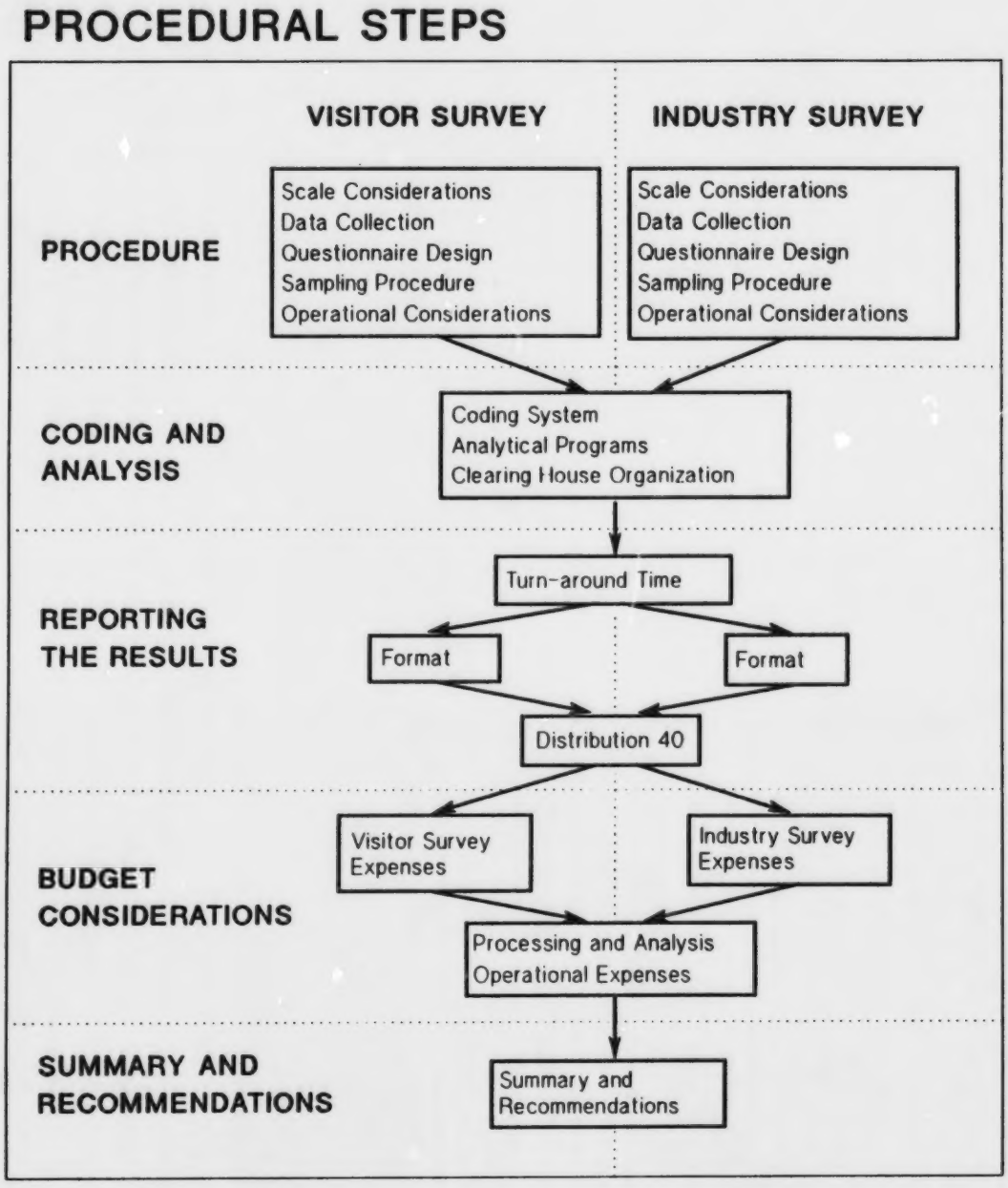
Somass Motel (two nights accommodation for two)

APRIL 1988: One day trip for two people on M.V. "Lady Rose"

SEPTEMBER 1988: Port Alberni Marina
Salmon Charters (fishing trip for two)

Exhibit 2

Procedural Steps of the
Tourism Monitor



PART TWO

PROCEDURE

A research design for a tourism monitor should incorporate five major steps:

1. scale considerations
2. data collection
3. questionnaire design
4. sampling procedure
5. general operational considerations.

Each of these are presented in terms of the two parallel surveys (visitor and industry survey) within the monitor.

2.1 SCALE CONSIDERATIONS

a) Visitor Survey:

The recommended operational scale is a regional district jurisdiction, because it is:

a) an established planning and development unit within the province;

b) it often coincides with major tourist attractions such as a town, local festival or major park;

c) it is small enough to possess local character, yet large enough to make data collection manageable.

Selection of a regional district scale should not preclude local modifications if the circumstances merit it.

This was the case in the VITM where preliminary field research and interviews with local tourist associations suggested the Gulf Islands offered a different product from

Vancouver Island and therefore attracted a different type of visitor. Consequently, these islands were set apart as the Gulf Island area. The actual VITM divisions are presented in Exhibit 3.

b) Industry Survey

In order to be compatible the industry survey should be structured along the same area divisions as the visitor survey. One objective of the industry survey is to report on business performance by area if there are sufficient responses to guarantee anonymity of the responding businesses. In the VITM this was only possible for the largest area (Greater Victoria), where more than 5 businesses per category, such as accommodation, responded regularly.

2.2 DATA COLLECTION

a) Visitor Survey - Self-Reporting

To minimize the cost of data collection the most efficient method is to develop a self-reporting situation for the visitor. This involves establishing data collection sites where the visitor can:

a) observe the survey notice and attached questionnaires;

b) have the time and convenience to answer the questionnaire;

c) drop the completed questionnaire in a secure collection box.

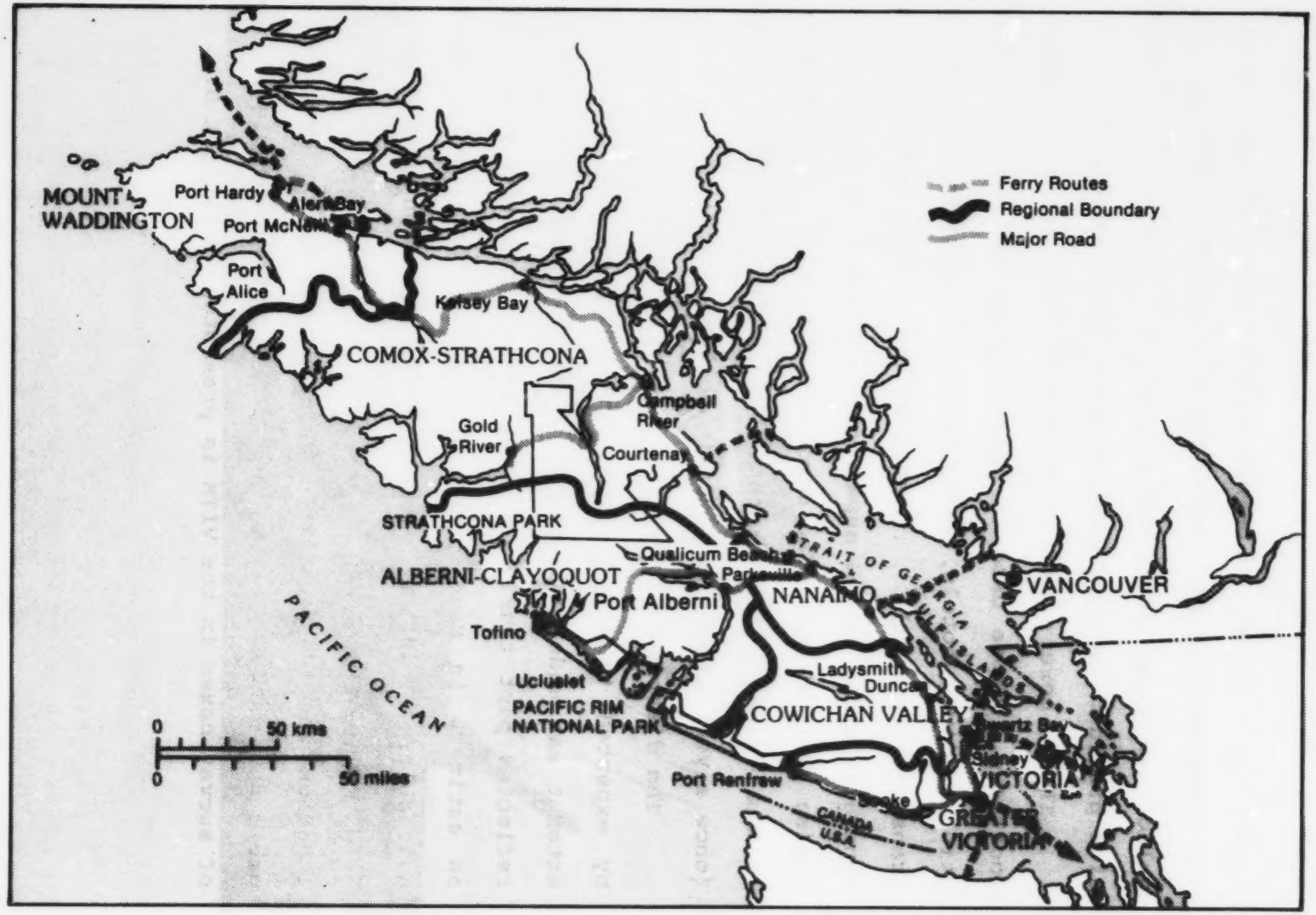


Exhibit 3

Areal Divisions used in VITM

These requirements can be met by creating a survey box along the lines used in the VITM. The survey box consisted of a 5 gallon ice-cream drum, and a rigid file box attached to its side provided the distribution point (Exhibit 4).

These boxes should be distributed in a variety of locations. Those used in the VITM included tourist information centres, hotels, restaurants, attractions, stores, and transport terminals. They take up little space and are generally under casual supervision, so cases of vandalism and misuse are minimal. The cardboard lid of the ice-cream drum is the weakest link in this design, and requires changing (once a year) in the more active collection sites.

The distribution of data collection boxes was influenced by expected tourist volumes and practical realities. An attempt was made to create a proportional distribution that reflected past tourist volumes, but it was little more than an estimate in some localities because local data was not available. This was one of the information gaps that the VITM was designed to fill. On some occasions an ideal location was not available because the approached business could not accommodate the survey box. The final distribution of survey boxes in the VITM is presented in Exhibit 5.

Exhibit 4

Photograph of VITM Visitor Survey Box

EXHIBIT 5

Distribution of Research Areas and
Their Respective Visitor Data Collection Sites

Area (Regional District)	Collection Sites
1. Greater Victoria (Capital) R.D.	32
2. Cowichan Valley R.D.	9
3. Nanaimo R.D.	13
4. Alberni-Clayoquot R.D.	13
5. Comox-Strathcona R.D.	10
6. Mount Waddington R.D.	8
7. Gulf Islands	4
Total:	89

Visitor Survey - Supplemental

If some prime collection sites exist in a region it is advisable to take advantage of those opportunities to supplement the major self-reporting survey. Such sites include ferry terminals, border crossings or any other location where visitors may be temporarily delayed and may be amenable to data collection as a distraction from the waiting. Under these circumstances the temporary hiring of a few people to distribute and collect the survey questionnaire can provide major dividends.

Such an opportunity presented itself in the VITM, where departing visitors were approached while waiting in line for a B.C. ferry. Two university students were hired to hand

out questionnaires to willing visitors, returning 15 minutes later to collect the completed questionnaires. This process was undertaken over seven different weekdays spread throughout the summer quarter, to catch mid-week and weekend travellers. During the other quarters the surveying was limited to a single weekend because this was considered to be the most cost-efficient way of gathering the data. The resulting contribution to the overall quarterly returns were 35 percent (summer), 12 percent (fall), 19 percent (winter), and 22 percent (spring). A very useful return from little extra funding.

b) Industry Survey - Sampling Frame

It is unlikely that a complete list of tourism businesses is available in a region so one will have to be constructed. To compile the list necessitates consultation of local association membership lists, accommodation directories, guide-books, telephone and city directories. Such a generated list is called the sampling frame and it provides the target population from which to sample individual businesses.

Industry Survey - Mail Survey

The most efficient way to reach the sampled businesses is via a mail questionnaire, because of their number and distant locations. Businesses are familiar with mail surveys

and postal costs can be controlled by using the Post Office's "Business Reply Envelope" system (see p. 36).

2.3 QUESTIONNAIRE DESIGN

a) Visitor Survey

A self-reporting questionnaire must be appealing and easy to follow if it is to be completed with little or no assistance. In order to satisfy the many interests of local tourist businesses and associations it also needs to be comprehensive. Balancing these two objectives is not easy, but a sample questionnaire based on the VITM model is offered as a guide (Appendix A).

This questionnaire is the result of a pre-testing process. A draft copy was tested on visitors using a tourist information centre during a public holiday weekend before the VITM started. While the visitors went through the questionnaire on their own a researcher was on hand to answer any queries and note any difficulties they were having. This exposure revealed that one or two minor corrections were needed to clarify parts of the questionnaire. On average it took 10-15 minutes to complete, the longer sessions being the result of discussions over places visited and amounts spent. Such pre-tests are invaluable and highly recommended.

The layout and questions are designed to lead the visitor from simple factual questions to evaluative statements and personal background material. While most of the

material is self-evident, some decisions and questions merit further explanation.

An introductory statement explaining the purpose and usefulness of the survey is important because the visitor may come across the survey without any personal contact or direction; plus in busy situations staff members may not have the time to explain all the details.

An individual questionnaire number is necessary to keep track of where in the region the questionnaires have been distributed. This information is required during coding and data entry to allocate the returned questionnaire to its particular area. It is also useful if individual businesses later request an independent market analysis, for it permits their questionnaires to be isolated from the general returns and analyzed separately.

Q.4. "Number of nights" attempts to trace the total trip time and time spent in your region. The area as far as the visitor is concerned is where he/she is filling in the questionnaire, and for our purposes is one of the pre-selected operational areas.

If the VITM questionnaire was completed in Parksville it was allocated to the Nanaimo R.D. area, and if on Salt Spring Island to the Gulf Islands area (see Exhibit 2). The question "how many nights were to be spent in B.C." confused many tourists who were B.C. residents, so we had answers like "all my life". Such a question could be attempted in a

different way, such as "if you are not a resident of B.C. please indicate how many nights will be spent in the province."

Q.5. "Type of accommodation" again attempts to detect the regional and local area patterns. This question worked well and picked up differences between the regional and local scales with regard to overnight visits. For example, visitors staying with relatives and friends spent most nights in the local area containing such contacts, and a few more nights travelling elsewhere throughout the region and B.C.

Q.6. "Route and Mode of Travel" matrix worked very well and enabled us to detect circular trip patterns, where the visitor entered the island through one gateway and left via another.

Q.8. Places visited list included the principal locations/attractions in each of the seven local areas and left plenty of space for the visitors to record their own itinerary.

Q.10. "Spending during a typical 24 hour day" was selected as the key question for the VITM survey. Due to the questionnaire's length we did not ask visitors to total their spending, but left space for the coder to do that. If a visitor answered this question they were included in the analysis, if not they were excluded, so the question was used as a filter.

Q.11. Total trip expenditure. This question DID NOT WORK, people who were mid-way through their vacation could not foretell or guess their total costs accurately. Most did not try.

It is not a major problem because the information can be obtained by extrapolating the visitors' daily total by their trip length information.

Q.16. "People in each age group" worked well, but because it is already complex we purposely left off a space for totals. This should be done by the coder and entered into the analysis as an additional variable.

Q.18. "Household income" worked well with over 90 percent of the visitors answering this normally sensitive question. However, the divisions used were very broad so most parties checked the same box, $40,000 - $59,999. It may be advisable to attempt narrower divisions even at the expense of a lower response rate.

Q.19. Visitor origin was coded in general terms such as B.C., Canada, U.S. or overseas; but for more specific marketing purposes the town and postal codes could be used.

Entry slip was to be filled out and detached along the perforated lines before being placed into the survey box. This reaffirms the confidentiality of the responses.

Summary

The questionnaire provided in Appendix A and the specific questions mentioned above are offered as a guide only, for it is expected that you will want to adapt this survey instrument to reflect local conditions and priorities.

The questionnaire is a very detailed document which allows for either general or specific analysis. For example, visitor origins may be coded by nation or province/state, or they can be classified by town or postal code for more detailed analysis. In addition it is possible to generate data from the origin question, such as calculating the actual distance travelled from home.

This particular questionnaire was designed for speedy analysis and distribution of the results, which prevented the use of open-ended probing questions. In some cases it may be considered desirable to include such questions. If this is done it should be borne in mind that they are difficult to quantify and code, which will slow down the analytical process. As usual you will face a trade-off situation, where local circumstances and priorities should dictate the final choice of questions and design.

b) Industry Survey

The mail questionnaire used in the VITM is presented in Appendix B. The actual questionnaire was broken into five sections, with the first two and last one being germane to

all sectors while sections 3 and 4 refer to a particular sector (accommodation, restaurants, attractions). This arrangement saves on printing costs because large numbers can be printed for the generic pages 1 and 3, while page 2 containing the individual sector questions can be printed according to the specific numbers required.

The questionnaire is designed to be easy to complete and should take only a few minutes of a business person's busy schedule. Since most of the questions are straightforward, explanation will be limited to only a few questions and components.

An introductory letter is vital when the questionnaire arrives via mail, for it is probably the first contact a business has with the monitor and its objectives. The letter should explain the monitor's purpose, the need for the business' input, and the utility of the monitor to the participating businesses. Appendix C illustrates the letter used to introduce the questionnaire to the VITM business sample.

The VITM was also fortunate in securing a cover letter from the Minister of Tourism, Recreation and Culture for its first industry questionnaire (Appendix D). This letter undoubtedly helped to give the survey an official presence and probably helped to achieve the highest return rate experienced throughout the year. It is highly recommended,

therefore, that all industry surveys attempt to secure similar letters of support from their appropriate sources.

The questionnaire number is a necessary device, to keep a record of those returning the questionnaire and to be able to place them into their respective areas. It is also the cornerstone of the panel approach used in the industry survey (see p. 30).

Q.2. "Employment". This question was split into three categories. It was decided to let the business decide on the appropriate allocation of employees rather than provide any hourly rates for part-time and casual employees, because no set hours seem to have received universal acceptance. When it came to calculating the Full-Time Equivalencies the VITM counted part-time employees as 1/2 and casual as 1/4 of full-time. It should be stressed that family members should be included in this question.

Q.5. "Economic Impact" is designed to elicit an estimate of the industry's contribution to the local economy. It is important to know how much money the tourism industry is bringing to a community, but it also means asking very sensitive questions regarding revenue. To avoid asking for direct financial information, and experiencing a consequent low response rate, a formula was devised whereby the business could eliminate revealing such sensitive information. It worked very well, with over 90 percent of the respondents completing this question.

Summary

The questionnaire provided in Appendix B and the specific questions mentioned are offered as a guide only. It is expected that local conditions may require new categories (such as guest ranches) or different divisions to account for smaller or larger operations.

In wording the actual questions it is strongly recommended that National Data Base Task Force suggestions be consulted, and used wherever practical (see Data Base Framework). The selection of identical questions and response divisions will enable your region to compare local industry data with provincial and national statistics, plus provide a source that could be disaggregated to local levels in non-monitor years for your region.

2.4 SAMPLING PROCEDURE

a) Visitor Survey

The goal of sampling is to select a subset of individuals that accurately reflect the characteristics of the total population, within the time and budget constraints of your project. Accordingly it is recommended that the visitor survey portion of a monitor use a non-probability sampling technique known as quota sampling.

Quota Sample:

A quota sample attempts to identify proportions within the population and match them to the sample (see Tourism

Research User Guide, available from the Ministry of Tourism and Provincial Secretary, Victoria, B.C.).

The quota sample has three aspects within a tourism monitor:

a) data collection sites should be distributed throughout the region in proportion to each area's tourist volumes.

The proportional representation will be in proportion to local estimates of tourist volumes in each area, and the actual distribution will depend on how many businesses are willing to host a data collection site.

b) to obtain as broad a range of visitor types as possible it should include a variety of collection sites.

Those recommended include visitor information centres, hotels/motels, restaurants, attractions, transport terminals and tourist-oriented stores. In the VITM the poorest returns were experienced with stores.

c) to obtain a cross-section of visitors establish a quota of one completed questionnaire per time period (i.e. every half or full hour).

For each time period a randomly selected visitor should be requested to participate. If successful each working day should produce between 8 and 12 returns per collection site. However, VITM experience revealed only information centres and some attractions were able to fulfill this objective. Others handed them out to all customers (hotel/motel rooms) or to random customers (restaurants), but the majority simply relied on the visibility and attraction of the survey box.

Sample Size:

A general rule of thumb is that the larger the sample size, the better. According to the Tourism Research User Guide where a population is greater than 25,000 people, a sample of approximately 400 is recommended. Since past provincial surveys suggested Vancouver Island received approximately 3 million visitors it was hoped to reach 500-1,000 people per quarter. In fact this objective was reached each quarter and exceeded in the summer and spring quarters (Exhibit 6). Even when some of the returns were rejected because of being incomplete, repeats, or "gag replies", the usable returns were generally well above the set minimum standard.

Exhibit 6

Distribution of Visitor Survey Returns

	Quarter	Returns	Analyzed Returns	Usable %
1.	Summer	6,937	5,204	75%
2.	Fall	1,165	823	71%
3.	Winter	1,332	920	69%
4.	Spring	1,860	1,360	73%
	Total	11,294	8,307	

Reliability:

Despite the non-probabilistic nature of the quota sample and varied manner in which it can be pursued in an unsupervised monitor, the actual results obtained by the VITM in its summer quarter were similar to those obtained in a Ministry of Tourism and Provincial Secretary survey of non-residential travellers to B.C., as published in its Visitors '87 report. When those visitors who travelled to Vancouver Island are compared to the VITM results there are some strong similarities, as indicated in Exhibit 7.

Exhibit 7

Comparison of Two Survey Results

	Visitor '87		V.I.T.M.	
Activities				
Rank 1	Sightseeing		Sightseeing	
2	Shopping		Tourist Attractions	
3	Gardens		Shopping	
Purpose of Trip				
"Business"	6%		7%	
Activities				
Sightseeing	64%	Rank 1	77%	Rank 1
Shopping	44%	Rank 2	59%	Rank 2
Historic Site	21%	Rank 3	40%	Rank 3
Friends/ Relatives	21%	Rank 4	31%	Rank 4
Cultural Performance	2%	Rank 5	6%	Rank 5
Sporting Event	1%	Rank 6	2%	Rank 6
Party Size	2.8		2.8	
Accommodation				
Hotel/Motel	48%		41%	
V.F.R.	19%		11%	
Camping/R.V.	21%		20%	
Cottages/B & B	3%		4%	
Daily Party Expenditure	$150.00		$155.55	
Daily Individual Expenditure	$54.00		$55.88	

b) Industry Survey

Stratified Sample:

A stratified sample is recommended when prior research or intuition suggests that the population contains

distinctive sub-groups which have their own particular characteristics (see Tourism Research Users Guide). In the case of a tourism monitor it is quite likely your region will contain a variety of area types (winter/summer destinations, gateway areas, transit areas, isolated or undeveloped areas) whose industry performance will vary considerably. To ensure representation of all these sub-groups the sampling frame should be stratified into operational areas and each sampled randomly. These operational areas will be the ones selected earlier on the basis of being distinctive local destinations.

Sample Size:

It is advisable to meet two criteria to establish the actual sample size for each strata:

a) establish a minimum number from each strata (operational area).

A frequently cited rule of thumb that would satisfy most statistical requirements is a minimum of 50 cases (businesses).

b) weight the actual number of cases in each strata in proportion to the expected volume of business and number of businesses in each area.

Again, the weighting will be estimated at first because calculation of business volume is an objective of the monitor.

In the VITM we selected more businesses for Greater Victoria (major destination) and Nanaimo (gateway) and selected 50 businesses as the minimum for less active areas.

The differences between targeted proportions and actual sample were the result of insufficient - or over-representation of a particular sector (accommodation, restaurant, attraction) within an area (Exhibit 8).

Exhibit 8

Sample Sizes in Vancouver Island Industry Survey

	Area	Number of Businesses Targeted	Sampled	Actual Percentage
1.	Greater Victoria R.D.	160	152	24%
2.	Cowichan Valley R.D.	80	89	14%
3.	Nanaimo R.D.	120	114	18%
4.	Alberni-Clayoquot R.D.	80	79	13%
5.	Comox-Strathcona	80	88	14%
6.	Mount Waddington	60	57	9%
7.	Gulf Islands	50	52	8%
	Total	630	631	100%

2.5 GENERAL OPERATIONAL CONSIDERATIONS

a) Visitor Survey

Because industry cooperation is so vital to the success of implementing the visitor survey several steps should be undertaken.

1. Minimize disruption of the tourist business.

Industry personnel should not be expected to commit any time on the survey beyond a) keeping an eye on the survey box, b) encouraging participation once per time period,

wherever feasible, c) mailing back the completed questionnaires in the supplied pre-stamped envelopes.

2. Explain the purpose and benefits.

To ensure industry personnel understand the survey and its objectives some time should be spent explaining these points in advance and when the boxes are delivered.

3. Booster trips.

A return trip each quarter is vital. This should be undertaken to ensure the box is still in operation; to check if it needs repair or replacement; to see if new staff have been familiarized with the survey; to check if new questionnaires and envelopes are needed, and whether the results are getting through to participating businesses.

4. Survey Time Periods.

Participating businesses must be reminded when a quarter is coming to an end; told to empty their boxes on the final day; and mail back the completed questionnaires and entry slips. They should be reminded at this point that the monitor, unlike so many other surveys, is a year long survey. Consequently, they should be encouraged to continue with the monitor and to contact the coordinating office if there are any problems.

5. Speedy distribution of results

To maintain interest in a year long monitor requires speedy distribution of the quarterly data results. The most efficient manner in which to distribute the results is via

local associations. They can place local highlights in their newsletter and have a complete copy of the results available for those interested. It is good policy to send the individual area results directly to each business which is supplying a steady stream of completed questionnaires.

6. "My-Market" sub program.

Remind participating businesses that an individual market analysis can be performed on their contributed questionnaires, using the "My-Market" sub-program (see p. 39). This is an important selling point and could be used as a means of generating some local revenue from the monitor.

b) Industry Survey

To examine the performance trends of local tourism businesses over a year requires repeat surveys of the same businesses throughout the year. A common strategy to detect trends and changes over time is to set up a "panel" of respondents.

1. Panel Survey

Those responding to the initial quarterly survey become members of the panel. Once a panel is established a gradual reduction in response rate can be expected, therefore it is important to establish as large a panel as possible. This is one reason why the VITM sample size was much larger than the standard minimum sample sizes.

The VITM experience with the panel survey approach is provided below (Exhibit 9).

Exhibit 9

Vancouver Island Industry Survey Returns

	Survey No. & Quarter	Sample Size	Returns	Percentage Response Rate
1.	Summer Quarter	631	166	26%
2.	Fall Quarter	166	60	36%
3.	Winter Quarter	166	52	31%
4.	Spring Quarter	166	53	32%
	Total		331	

2. Explain the purpose and benefits.

To make sure the industry understands the survey and its objectives set up meetings with local industry representatives through their local tourist associations. Explanation of the questionnaire should include the need for small family operations to count family members as employees, where relevant. Businesses should be encouraged to tackle the simple economic impact equation, because it aids local associations in gauging the industry's contribution to the local economy.

3. Confidentiality and Reporting

In order to guarantee confidentiality it is necessary to make a commitment in writing not to report a sector's results

unless there is a minimum number of respondents in that category.

The minimum number selected for the VITM was five per category. The categories selected were based on National Data Task Force recommendations and the observations of local industry representatives. They were as follows:

Accommodation	Hotels and Motels Small ≤ 25 units Medium 26 - 75 units Large >75 units Campgrounds Small ≤ 50 sites Large >50 sites Cabins Bed and Breakfast
Restaurants	Small ≤ 75 seats Large >75 seats
Attractions	Marina and Boat Rentals Golf Courses Museums

It is not always possible to report all the returned questionnaires because sometimes there may be fewer than five respondents. When this happens it is sometimes possible to collapse two categories into one, as was done on occasion in the VITM with small and medium hotels/motels. But sometimes it means that a category must be eliminated from the report, as happened with golf courses in VITM's winter quarter. Happily they returned sufficient numbers to be included in the spring quarter results.

4. Time period for responses

Businesses must be given an adequate time period for collecting together their data and responding. Questionnaires were sent out in the last week of each quarter and the businesses were given a month within which to respond. However, it was generally necessary to provide an additional two week grace period. Even so, there were sometimes a few late returns that consequently could not be included in the quarterly analysis.

5. Colour-coded returns

In order to distinguish between each quarter, the questionnaires should be colour-coded by quarter. This will help the questionnaire stand out in the "in-tray" and help to alert the coders when they receive an exceptionally late return--sometimes from a preceding quarter.

6. Postage

To keep postal costs down it is recommended that a Business Reply Envelope Account be opened with your local post office. This service provides a special postal code for the pre-paid return envelopes, which means you will only be charged for those actually returned. There is a slight premium for this service, but it is far less expensive than wasting postage on all the return envelopes when only 26-36 percent are returned.

PART THREE

CODING AND ANALYSIS

To quickly analyze and distribute the data back to the industry requires:

- a simple coding system
- a user-friendly analytical program
- an organized and committed clearing house

3.1 CODING SYSTEM

Once the data arrives it must be coded into a computer usable format. The most useful form for the computer is numeric code, with "real" numbers (interval, ratio measurement) like "dollars and cents", "number of days" wherever possible, with "ranked" numbers (ordinal measurement) for rating questions, and "category" numbers (nominal measurement) to classify visitors by place of origin or restaurants into large and small categories.

3.2 ANALYTICAL PROGRAMS

Since the data will be arriving at the clearing house in a steady stream of mail deliveries, it requires a computer program that can transform it into an open-ended filing system, which can be updated during the quarter and closed at the end of the quarterly period. This requires a simple and user-friendly spreadsheet program, and it is recommended that interested parties consult the Ministry of Tourism and

Provincial Secretary regarding its Standardized Data Base Framework.

The VITM used the D-Base III Plus spreadsheet program. The program sets up a data base file (filing system) which can be designed to use the monitor information once a field list is created (a list of the variables you wish to enter and analyze). This list can be as detailed and exhaustive as you wish to make it.

The D-base III Plus program can run on an IBM PC, PC-XT, PC-AT or a 100% IBM-Compatible Machine. It can be used with either a two floppy disk drive or hard disk/floppy disk drive machine. The VITM experience revealed that when there are more than 1,000 cases (visitors or businesses) to be analyzed it was preferable to use the hard drive option because the program is rather slow.

One of the advantages of this program is that it permits individual customizing of the analysis by introducing your own sub-programs to its general menu. This was done in two instances with the VITM, to provide more efficient analysis and to make the monitor more "saleable" to various businesses.

a) "MA-Main Activity Analysis"

This program tabulates the number of activities engaged in by visitors during their trip (Question #9). The total number of optional answers for this question could be 21,

which when combined with several hundred responses creates a laborious counting process if done without this subprogram.

b) "MM-My-Market"

This program scans the total data set, extracts the questionnaires submitted by a single participating business and sets them into a new file for separate analysis. This can be done on a quarterly basis and therefore offers individual participants their own private market analysis. Both of these sub-programs are available from the B.C. Ministry of Tourism and Provincial Secretary.

3.3 CLEARING HOUSE ORGANIZATION

To record the returning questionnaires necessitates the development of a master distribution list for both the visitor and industry surveys.

(i) Master file - Visitor Survey

Each return envelope should be recorded in the master file, noting the number of questionnaires returned as shown in Exhibit 10.

Exhibit 10

Recording Visitor Returns in Master File

Questionnaire No.	Business Location	Area	Returns
1 - 250	Restaurant X	1	35+14+32+
250 - 500	Hotel Y	2	46+33//27+
501 - 1000	Big City Info. Centre	3	91+48+71+
1001 - 1250	Hotel X	3	40+35+24+

Note a normal distribution is 250 questionnaires per establishment, but in some cases where visitor volumes are expected to be high 500 or more could be left with the business. When the returns are received the total number received is noted in the right hand column. When a quarter is completed this column is marked off//, with a different coloured ink used to signify the numbers in each quarter.

(ii) Master File - Industry Survey

A similar file needs to be constructed for the industry survey to indicate which businesses should be included in the panel study and whether there are sufficient returns to report by category or area.

(iii) Screening Returned Questionnaires

The visitor questionnaire used in the VITM took approximately 2-3 minutes to code, producing an average 20-25 completed entries per hour. With 6,000 plus questionnaires received for the summer quarter this would have taken 300 hours or 43 seven hour days. Consequently, it is recommended

all questionnaires should be screened, and only the more complete submitted for coding and analysis.

The VITM screened out "unusable" questionnaires by rejecting:

a) those which were blank;

b) those which were repeats, in that more than one member of a party had submitted a questionnaire;

c) "gag" returns;

d) those which failed to answer the preselected filter question, namely Question #10 "spending during a typical 24 hour day".

The VITM experienced a 25-30 percent wastage with this process. It saved a lot of coding time and the wastage rate was not excessive considering it was an unsupervised survey; and it compares favourably with regular losses of 50 percent in standard mail surveys.

To facilitate the recording, coding and analysis it is recommended that a single person, with a back-up reserve, be allocated to this task. Such familiarization will ensure consistency and speed in the analytical process. Help from a computer analyst regarding the coding and analysis implications of your questionnaire design could save a great deal of time and money.

PART FOUR

REPORTING THE RESULTS

If a monitor is to be successful its information must be relayed to the local associations and industry as quickly as possible and in a useful format.

4.1 TURN-AROUND TIME

A realistic turn-around time for the visitor surveys is one month after the completion of a quarter. The VITM was able to meet this schedule for every quarter except the summer. The summer quarter was the initial test case and provided the largest return rate because of seasonal peaking. Both factors slowed down the processing of data, but the results were still distributed during the following quarter.

For the industry survey a realistic turn-around time is two months after the quarter's end. This allows a six week reply period after the conclusion of a quarter and a two week analysis period. The VITM actually chose to distribute the results with each succeeding quarterly survey so this took the pressure off the turn-around time.

4.2 FORMAT - VISITOR SURVEY

In order to offer each business a comparative picture it is recommended that the visitor survey be reported both on an area and regional basis. An example is provided in Appendix E.

Format-Industry Survey

It is recommended the results be laid out on a sectoral basis, so that each business can compare itself with its sector's records. Where possible (when meeting minimum number requirements) the results should also be published in terms of an operational area.

To provide an overall picture for all businesses, present an assessment of the quarter's results and trends via an overview summary.

An example of the above points is presented in Appendix F.

4.3 DISTRIBUTION

Distribution of all the results should go to the regional tourism office and all local tourism associations, for further dissemination. The VITM also sent individual (sector) results to participating industry panelists, and individual (area) results to major suppliers of visitor questionnaires.

PART FIVE

BUDGET CONSIDERATIONS

Based on the VITM experience the following budget estimates are offered for consideration.

5.1 VISITOR SURVEY EXPENSES

Printing of 50,000 Visitor Questionnaires.....$6,000

Numbering and perforations are essential extras. The VITM distributed 45,000 questionnaires over the twelve month period.

Production of 100 survey boxes.....$700

The key to this figure was purchase of 5 gallon ice-cream drums from a local dairy.

Visitor questionnaire postage.....$200

Pre-paid postage on the envelopes left for returned questionnaires.

Quarterly booster visits to each area.....$2,800
and its major participants.

5.2 INDUSTRY SURVEY EXPENSES

Printing of four quarterly business surveys.....$800

Business Survey Postage.....$700

Use of the business return postage system helps to keep these costs down.

5.3 PROCESSING AND ANALYSIS EXPENSES

Data coding and entry.....$12,000

This is likely to be the most expensive single item in the monitor, especially if your monitor is a success. To keep a ceiling on these costs in the VITM, returned questionnaires were screened and coders were paid on a piece-rate basis of 60¢ per questionnaire entered.

Computer time.....$2,000

5.4 OPERATIONAL EXPENSES

Photocopying.....$500

Mainly for the distribution of results to local associations and businesses.

Telephone.....$500

Used mainly to set-up on-site visits and handle questions/ crises.

PART SIX

SUMMARY AND RECOMMENDATIONS

The monitor procedure outlined in this manual is easy to operate, provides reliable data, and is responsive to local conditions.

What makes it work is:

a) the desire to have up-to-date data on local tourism trends;

b) an industry willing to cooperate in such a venture;

c) an industry willing to invest a small sum to gather the facts and take its pulse.

An industry-driven monitor does not come without costs-one being exhaustion. Continual requests for information from visitors and businesses can definitely become burdensome. In the VITM one of the hardest tasks was to maintain the interest and enthusiasm over a full twelve months. This proved to be feasible because the monitor was scheduled to finish after the twelve months.

It is recommended, therefore, that regional tourism monitors operate on a 2-4 year timetable. This would provide up-to-date tourism trends while affording the industry and its visitors a respite between surveys.

INFORMATION SOURCES

You are encouraged to consult the following references for more detailed information regarding research operations.

Dillman, A. Mail and Telephone Surveys. (3rd Edition). New York: John Wiley, 1978.

Backstrom, C.H. & Hirsh, César, G. Survey Research (2nd Edition). New York: John Wiley, 1981.

Derek Murray Consulting and Associates. Tourism Research User Guide. Victoria, B.C.: Ministry of Tourism and Provincial Secretary, 1987.

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Ritchie, J.R.B. & Goeldner, C.R. Travel, Tourism and Hospitality Research. New York: John Wiley, 1987.

Stoddard, R.H. Field Techniques and Research Methods in Geography. Dubuque, Iowa: Kendall Hunt, 1982.

APPENDICES

APPENDIX A

VANCOUVER ISLAND VISITOR SURVEY

We hope you are enjoying your trip on Vancouver Island. We need to conduct periodic traveller surveys to discover where island visitors and island residents are travelling, what they are doing on those trips, and how satisfactory their experiences have been so as to improve our service to you. Thank you for volunteering to help us in this project and good luck on the draw.

No.: 37463

1. To begin with please state the **main** purpose of this trip (check only one option).

   BUSINESS:
   - ☐ Convention/Conference
   - ☐ Other business

   PLEASURE:
   - ☐ Visit friends/relatives
   - ☐ Touring/sightseeing
   - ☐ Wilderness/adventure trip
   - ☐ Outdoors trip
   - ☐ City trip
   - ☐ Drive in country
   - ☐ Special Event (please specify) _____
   - ☐ Other (please specify) _____

2. Is this your first trip to, or on, Vancouver Island? ☐ YES ☐ NO

3. If you are on a day trip with **no overnight stop** please check here ☐ and proceed to Question #6 if you are a visitor to Vancouver Island or to Question #7 if you are an island resident.

4. If you are on an overnight trip please indicate the **number of nights** you will
   - (a) be **away from home** on this trip: _____
   - (b) be spending **in British Columbia** on this trip: _____
   - (c) be spending **on Vancouver Island**: _____
   - (d) be spending **in this area** (town or locality where you are answering survey): _____

5. What **type of accommodation** will you use during your stay on Vancouver Island and in this particular area (if applicable)? If you will use more than one type of accommodation in either area, indicate the **respective number of nights** in each type.

ACCOMMODATION TYPE	VANCOUVER ISLAND	THIS AREA (where you are answering this survey)
Hotel		
Motel		
Camp/Trailer Park		
Bed and Breakfast		
Home of Relative/Friend		
Other (please specify) _____		
Other (please specify) _____		

6. For **visitors to this island**, please indicate which route and means of travel you used to arrive on Vancouver Island and what route and means of travel you intend to use on your departure.

ROUTE	ARRIVAL				DEPARTURE			
	Commercial Airline	Car Ferry	Cruise Ship	Private Plane/Boat	Commercial Airline	Car Ferry	Cruise Ship	Private Plane/Boat
Vancouver - Victoria								
Vancouver - Nanaimo								
Seattle - Victoria								
Anacortes - Sidney								
Port Angeles - Victoria								
Prince Rupert - Port Hardy								
Powell River - Comox/Courtenay								
Other _____								

7. What was or will be your **main** form of transportation around Vancouver Island? (Check one only)

☐ Private Car ☐ Intercity Bus ☐ Recreation Vehicle ☐ Tour Bus
☐ Rental Car ☐ Commercial Aircraft ☐ Chartered/Private Boat ☐ Train
☐ Other (please specify) _____

8. Please check which places you and others in your party **have visited** or **intend to visit** during this trip on Vancouver Island.

☐ Victoria ☐ Nanaimo ☐ Duncan ☐ West Coast Trail
☐ Port Alberni ☐ Ucluelet ☐ Qualicum ☐ Campbell River
☐ Bamfield ☐ Pacific Rim Nat. Park ☐ Courtenay ☐ Chemainus
☐ Parksville ☐ Port Hardy ☐ Gulf Islands ☐ Strathcona Park
☐ Others (please specify) ☐ _____ ☐ _____ ☐ _____
☐ _____ ☐ _____ ☐ _____ ☐ _____

9. Which of the following **activities** did, or will, you and your party participate in while on Vancouver Island? Please check the appropriate boxes.

☐ Visiting tourist attractions
☐ Visiting friends/relatives
☐ Local festivals or events
☐ Shopping
☐ Sightseeing
☐ Attend cultural event
☐ Visit historic site/natural display
☐ Visit national/provincial park
☐ Attend sports event
☐ Participate in sports or outdoor recreation (specify)
  ☐ Swimming ☐ Skiing (cross country)
  ☐ Boating ☐ Bicycling
  ☐ Fishing ☐ Hiking
  ☐ Skiing (downhill) ☐ Hunting
  ☐ Golfing ☐ Strolling
  ☐ Other _____

10. Please estimate how much money you and your party spent, or will spend, during a **typical 24 hour day** on Vancouver Island. OR, if you are not on an overnight visit, what do you expect to spend today? (Please include credit card purchases)

Accommodation $_____
Automobile (gas and oil) $_____
Local transport (bus/rail) $_____
Groceries and beverage $_____
Gifts and souvenirs $_____
Restaurant Meals $_____
Recreation and entertainment $_____
Pre-paid Island Tour Package $_____
General Shopping $_____
Other (please specify)
_____ $_____

11. What do you estimate will be the **total trip expenditure** for your travel party? (Please include credit card purchases and airfare where applicable)

$_____

12. (a) Which of the following were your **sources of information** for this trip?

- ☐ Travel Agent
- ☐ Requested Brochures via mail
- ☐ Information Centre
- ☐ Word of Mouth
- ☐ Friends/Relatives
- ☐ Radio/Television
- ☐ Magazine/Newspaper
- ☐ Other (please specify) _____

(b) Which source, if any, convinced you to make this trip? _____

13. How far ahead did you plan this trip?

- ☐ "Spur of the moment"
- ☐ One day
- ☐ One week
- ☐ One month
- ☐ Two to six months
- ☐ Over six months

14. If any of the following were **important when considering this Vancouver Island trip** please indicate where applicable.

	VERY IMPORTANT	IMPORTANT	OF SOME IMPORTANCE
"Super-Natural" British Columbia advertisements	☐	☐	☐
Smaller towns and villages	☐	☐	☐
Outdoor scenery	☐	☐	☐
National/Provincial parks	☐	☐	☐
Local parks and gardens	☐	☐	☐
Resort areas	☐	☐	☐
Nightlife and entertainment	☐	☐	☐
Shopping	☐	☐	☐
City scenery	☐	☐	☐
Live theatre and musicals	☐	☐	☐
Local festivals and events	☐	☐	☐
Museums, art galleries	☐	☐	☐
Historic sites/parks	☐	☐	☐
Local crafts	☐	☐	☐
Cultural activities	☐	☐	☐
Outdoor recreation/activities	☐	☐	☐
"Canada: The World Next Door" advertisements	☐	☐	☐

Department of Regional Industrial Expansion

British Columbia Ministry of Tourism, Recreation and Culture

British Columbia Ministry of Economic Development

Tourism Victoria

PLEASE CONTINUE OVERLEAF . . .

15. Please give us your **overall impression of Vancouver Island** as a result of this visit

	EXCELLENT	GOOD	FAIR	POOR	NOT APPLICABL
Hotels/Motels	☐	☐	☐	☐	☐
Restaurants	☐	☐	☐	☐	☐
Tourist Attractions	☐	☐	☐	☐	☐
Public Recreation Areas	☐	☐	☐	☐	☐
Visitor Information Centres	☐	☐	☐	☐	☐
Service	☐	☐	☐	☐	☐
Cleanliness	☐	☐	☐	☐	☐
Friendliness	☐	☐	☐	☐	☐

For statistical purposes we would like to know a little about yourself. This enables us to group the responses and plan specific groups and interests.

16. Please indicate the **number of people within each age group** that are in your party.

	AGE (years)							
	0 - 12	13 - 18	19 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
MALE								
FEMALE								

17. Please indicate the highest level of education completed by any member of your party.

☐ Junior High School ☐ Community College/Trade School ☐ Post Graduate Studies
☐ Senior High School ☐ University

18. Please indicate into which of the following income groups your HOUSEHOLD INCOME (before taxes) falls.

☐ Less than $20,000 ☐ $20,000 - 39,999 ☐ $40,000 - 59,999 ☐ $60,000 and over

19. Please indicate your home town, province/state and postal/zip code.

Town/City _____ Province/State _____

Postal/Zip Code _____

ENTRY SLIP FOR PRIZE DRAW

THANK YOU for your co-operation and assistance in this survey. To enter for the prize draw and to remain anonymous, please fill in this section, detach from the questionnaire and place both in the box provided.

NAME _____

ADDRESS _____
STREET

_____
TOWN

_____
PROVINCE/STATE POSTAL CO

THANKS AGAIN, AND HAVE A SAFE TRIP HOME!

APPENDIX B

No.: _____

TOURISM INDUSTRY SURVEY

(Vancouver Island Tourism Monitor)

WINTER QUARTER

1. PERIOD OF OPERATION AND SURVEY

a) Please report on the period January 1, 1988 to March 31, 1988. If you did not operate this business for the full period, please complete the report for the period you were in business and note that period below.

This report covers the period from ___/___/___ (D M Y) to ___/___/___ (D M Y)

b) Please indicate if your business is operated: [ ] YEAR ROUND [ ] SEASONALLY

If seasonal, usual opening date is: ___/___ (Day Month)

usual closing date is: ___/___ (Day Month)

2. EMPLOYMENT

a) Please indicate how many **persons** your business/operation **employed for the winter quarter**, (January 1 — to March 31, or portion thereof). Include family members if applicable.

Full-time — Regular employees who worked the standard work week observed by your business. _____

Part-time — Those who worked regularly but for fewer than the standard work week hours observed by your business. _____

Casual Employees — Those who worked for brief periods of time and who, from the employers point of view, are not expected to work on a regular basis. _____

b) What was your approximate payroll for the winter quarter? (Please include salaries, wages and benefits and estimate to the nearest thousand dollars.) $_____

3. FACILITY DESCRIPTION (ACCOMMODATION)

a) Please give the number of each type of unit.

_____ Rooms
_____ Cottages and Cabins
_____ Serviced Camp Sites (with one or more of water, sewage, electric hook-ups).
_____ Unserviced Camp Sites
_____ **Total of Above**

b) Please give the number of restaurant and lounge seats, where applicable.

Number of restaurant seats _____ Number of lounge seats _____

c) Are meeting facilities offered on these premises? ☐ Yes ☐ No

If yes, please indicate the seating capacity of your largest meeting room (theatre style).

☐ Under 25 ☐ 50-99 ☐ 150-199 ☐ 500-749
☐ 25-49 ☐ 100-149 ☐ 200-499 ☐ 750-999
☐ 1000 and over

4. PERFORMANCE (ACCOMMODATION)

a) What was your **AVERAGE number of occupied rooms/sites** for the **MONTH** of:

MONTH	AVERAGE NUMBER OF OCCUPIED ROOMS	AVERAGE NUMBER OF OCCUPIED CAMPSITES
January		
February		
March		

b) What was the **AVERAGE length of stay per party** for the **MONTH** of:

MONTH	AVERAGE NO. OF NIGHTS
January	
February	
March	

c) What was the **AVERAGE party size** for the **MONTH** of:

MONTH	AVERAGE PARTY SIZE
January	
February	
March	

3. FACILITY DESCRIPTION (ATTRACTIONS)

Please indicate which type of attraction best describes your operation. (Check one only)

- ☐ Museum
- ☐ Historic Site/Park
- ☐ Theatrical/Stage Entertainment
- ☐ Professional or Semi-Professional Sports
- ☐ Golf Course
- ☐ Curling Club, Tennis Club, Racquet Club
- ☐ Skiing Facilites
- ☐ Boat Rental, Marina, Charter Services
- ☐ Fishing Charters
- ☐ Amusement Park
- ☐ Bowling Alley or Billiard Parlour
- ☐ Art Gallery
- ☐ Industrial or Civic Tour
- ☐ Boat Cruise
- ☐ Roller Skating Facilities
- ☐ Coin Operated Amusement Facilities
- ☐ Botanical/Zoological Garden
- ☐ Other: (Please Specify) _____

_____

_____

4. PERFORMANCE (ATTRACTIONS)

Approximately how many customers did you receive during the winter quarter?

	JANUARY	FEBRUARY	MARCH
Under 100	☐	☐	☐
100 — 249	☐	☐	☐
250 — 499	☐	☐	☐
500 — 749	☐	☐	☐
750 — 999	☐	☐	☐
1,000 — 2,499	☐	☐	☐
2,500 — 4,999	☐	☐	☐
5,000 — 7,499	☐	☐	☐
7,500 — 9,999	☐	☐	☐
10,000 — 14,999	☐	☐	☐
15,000 or more	☐	☐	☐

3. FACILITY DESCRIPTION (RESTAURANTS)

a) Please indicate which description best fits your operation (check where appropriate).

☐ Fast Food	☐ Delivery Only	☐ Take Out
☐ Counter Service	☐ Cafeteria	☐ Table Service
☐ Low Priced	☐ Medium Priced	☐ Premium Priced

b) Please indicate the number of seats in your restaurant. _____ Seats

c) Please check which of the following meals you serve:

☐ Breakfast	☐ Lunch
☐ Dinner	☐ Snacks

4. PERFORMANCE (RESTAURANTS)

APPROXIMATELY what was the **number of meals served per day** during the winter quarter?

	BREAKFAST	LUNCH	DINNER	SNACK
Under 25	☐	☐	☐	☐
25-49	☐	☐	☐	☐
50-74	☐	☐	☐	☐
75-99	☐	☐	☐	☐
100-149	☐	☐	☐	☐
150-199	☐	☐	☐	☐
200-249	☐	☐	☐	☐
250-299	☐	☐	☐	☐
300-349	☐	☐	☐	☐
350-399	☐	☐	☐	☐
400 or more	☐	☐	☐	☐

5. ECONOMIC IMPACT

It is important to know how much tourism is contributing to the local economy, if the industry is to receive the attention it deserves. You can help provide an estimate of its impact **WITHOUT divulging details of your own business** by using the following calculation:

ECONOMIC IMPACT = GROSS REVENUE (G.R.) × TOURIST BUSINESS (T.B.)

Steps:

a) G.R.: Estimate, but **keep to yourself**, your gross revenue for the past quarter (January 1 — March 31, 1988) or operating portion thereof. Calculate to nearest thousand dollars.

b) T.B.: Estimate, but **keep to yourself**, the percentage of your business attributable to tourism. In this case a tourist is a customer who travelled 40 km / 25 miles or more to use your services. (If you reckon 75 percent of your business is tourist related place 0.75 in the calculation.)

Example:

ECONOMIC IMPACT = G.R. × T.B.
= $1,000,000 × 0.75
= $ 750,000 ◄ Only Declared Figure

Using the above calculation method please estimate the economic impact of your business during this reporting period.

Economic Impact = $ _____

APPENDIX C

September 30, 1988

Dear Sir/Madam:

The federal and provincial governments in association with Tourism Victoria and with the endorsement of TAVI are conducting a Vancouver Island Tourism Monitor between July 1, 1987 and June 30, 1988. The objective of this monitor is to collect data relating to Vancouver Island's tourism performance and seasonal trends, utilizing the assistance of the industry to provide such information on a local scale and more immediate basis. Consequently we need your help in obtaining accurate and up to date information that can be used by your local tourist associations and you to gauge regional business trends and marketing effectiveness. For the purposes of this monitor the island has been divided into the following reporting areas, Greater Victoria (Capital Regional District), Cowichan Valley Region, Nanaimo, Alberni-Clayoquot, Comox-Strathcona, and Mount Waddington.

The monitor consists of two parallel surveys, a quarterly visitor survey and a quarterly industry survey. The visitor survey for this past summer, July 1 - September 30, has just concluded with over 5,000 completed questionnaires returned. Information was obtained on the origin of visitors, the number of days and expenditures in various regions of the Island, plus their travel routes and information sources. This information will be analysed and made available to you through your local tourism association in November.

The purpose of the industry survey is to complement and check the information gathered from the visitors. You are one of several businesses that has been selected at random from among the tourism sector in your area, to report on this past quarter's activity. The information you provide will be kept strictly confidential. Only Dr. Murphy at the University of Victoria will be able to identify individual returns and no results will be published until there are five or more responses in a group. The groups are the accommodation sector, restaurants and attractions.

If you could spare a few minutes to review the past three months and answer some simple questions about your business experience it would be a great help in developing an accurate monitor, plus provide a local picture by which to gauge your own performance. I hope you will help us in this survey, and if you decide to participate could you please return the questionnaire by October 30. This will enable me to analyse the data and submit the regional trends to your local tourism association in November, along with the visitor survey results. Most tourist associations have indicated they will publish the results in their newsletters but if you participate and do not receive any results please don't hesitate to call me at 721-7329.

Thank you for your consideration of this request.

Yours sincerely,

Peter E. Murphy

Peter E. Murphy, Ph.D.
Professor

PEM:sc

MONITOR SPONSORS:

Department of Regional Industrial Expansion
British Columbia Ministry of Tourism, Recreation and Culture
British Columbia Ministry of Economic Development
Tourism Victoria

Province of
British Columbia

OFFICE OF THE
MINISTER

APPENDIX D

Ministry of Tourism,
Recreation and
Culture

Parliament Buildings
Victoria
British Columbia
V8V 1X4

TO TOURISM ASSOCIATION OF VANCOUVER ISLAND
AND TOURISM VICTORIA

It is a pleasure for me to welcome your participation in a project that will so positively affect Vancouver Island as a tourist destination. Your initiative and commitment to the industry based here is indeed gratifying.

As you are aware, the lack of reliable data at the local level has long been a problem in the tourism industry. At the same time, the need for a more accurate measure of tourism's record is becoming critical. What we require is an indication of tourist profiles (demand side) and the local industry's impact (supply side).

In order that businesses involved in the tourist industry have a good idea of their individual performance, it is necessary that expanded data be developed.

I am most gratified that you are undertaking this project as a team. With the arms length assistance of Dr. Peter Murphy of the University of Victoria, the confidentiality of this study will be assured. He and his staff will be assessing the responses of Vancouver Island industry people. I am hopeful that the sample of 660 establishments on the Island will recognize how important this study is for them, and participate in the Regional Tourism Destination Monitor by filling out the questionnaire.

The manual that will result from this study will give tourist associations and tourist sector people at the local level the tools with which to gather their own data. The Vancouver Island study will become a model for launching the study in other regions.

Data gathered will help to reveal trends. The impact of special promotions and events, for example, can then be looked at. I would like, at this point, to acknowledge that this project is partially funded through the Economic Regional Development Agreement (E.R.D.A.).

Again, my sincere appreciation for initiating this important work. It is my hope that the Regional Tourism Destination Monitor will go far to assist in providing useful information to tourism sectors in all regions across British Columbia.

Best regards,

Bill Reid
Minister

APPENDIX E

VANCOUVER ISLAND TOURISM MONITOR

VISITOR DATA FOR APRIL 1 - JUNE 30, 1988

Report on Alberni-Clayoquot Region

		Region (Replies = 258) (Gp. Size = 2.8)		Vancouver Island (Replies = 1357) (Gp. Size = 2.8)
A. PURPOSE OF TRIP AND ACTIVITIES:				
Business trip	=	8 %		11 %
Pleasure trip	=	92 %		89 %
Activities:				
Visit Tourist Attractions	=	72 %		72 %
Visit Family and Friends	=	28 %		29 %
Local Festivals	=	8 %		9 %
Shopping	=	47 %		59 %
Sightseeing	=	77 %		76 %
Cultural Event	=	8 %		7 %
Visit Historic Site	=	48 %		43 %
Visit National/Prov. Park	=	76 %		37 %
Attend Sports Event	=	1 %		2 %
3 Major Outdoor Rec. Activies:				
1. Strolling	=	51 %	Strolling	30 %
2. Hiking	=	46 %	Hiking	17 %
3. Swimming	=	13 %	Swimming	9 %
B. VISITATION PATTERN				
First trip	=	21 %		31 %
Day trip	=	2 %		9 %
% of parties overnight on V.I.	=	92 %		85 %
Av. No. of nights spent on V.I.	=	5.9 nights		4.4 nights

APPENDIX F

VANCOUVER ISLAND TOURISM MONITOR
Winter Quarter (January - March, 1988)
Industry Results

A total of 52 returns were received from the survey mailed to the industry sample in the spring. Following the commitment of five returns in a particular category it was not possible to report separately on golf courses or museums for this quarter. Part of the problem, of course, is that several establishments reported they were closed for the quarter (5 returns) and three had changed owners/management, which disrupted their accounting process.

Consequently we were left with 39 reportable returns which have been analysed in the usual manner and the results included for your consideration. It should be noted that this resulted in small category sample sizes throughout and as a result some unusually high scores may have distorted the overall averages. Where we suspect this may have happened, based on past quarterly results, we have also indicated the average value ( ) with the unusual individual return excluded.

To provide some trend perspectives to these results, the following observations can be made:

For Accommodation January was the low point for occupancy rates among the hotels and motels and bed and breakfast establishments. But the small hotels and motels recovered well by March, where their 60.8% occupancy rate was ahead of their best fall showing of 55.3% in October. Similarly the large hotels and motels recovered substantially to 50% which placed second to their fall figure of 56.3% in October. Bed and

Breakfast establishments generallly doubled or trebled their fall performance. Overall the length of stay increased during the winter quarter, employment and monthly F.T.E. payroll fell. Campgrounds and Cabins replied in sufficient numbers to reappear once again in the table. Their low point was February. The long average length of stay was due to one campground reporting a significantly permanent clientelle.

Restaurants experienced a similar performance to the fall, but the finer breakdown of meals served helps to show more detail. Generally both small and large restaurants were operating at similar levels to the fall, but it is now more evident that dinners are the prime activity. The employment levels were down for small restaurants and up for the large, but the monthly F.T.E. payroll was lower than the fall in both cases.

Attractions are once again represented only by Marina and Boat-Rentals. Their number of customers were down in Janauary and February compared to the fall but recovered to fall levels in March. The employment situation was vey similar to the fall, so not surprisingly the monthly F.T.E. payroll was roughly the same.

If you would like to compare your figures with the visitor survey results for the winter quarter in your area please contact your local tourist association which has copies of these results.

VANCOUVER ISLAND
ACCOMMODATION SECTOR

Winter Quarter, January - March 1988

Type	Hotels & Motels		Camp. & Cabins	B & B
Characteristics	Small (≤25 units)	Med/Large (>25 units)		
Sample size	7	7	5	5
Av. days of op. (91 day max.)	91	91	91	91
Averages for:				
Units/sites	16	81	63	3
Restaurant seats	70 (2)	80 (5)	18 (1)	--
Lounge seats	30 (2)	94 (3)	70 (1)	--
Largest meeting room capacity	25-49 (4)	50-99 (5)	--	--
Rooms/site occupancy				
January	42.8%	35.8%	21.3%	24.1%
February	57.5%	42.3%	15.8%	29.4%
March	60.8%	50.0%	31.8%	30.8%
Av. length of stay (days)	4.6	7.1 (4)* (1.8)	9.5* (2.5)	1.8
Av. party size	1.7	1.7	1.8	1.7
Employment Averages for:				
Full-time	3.2	14.3	8.0 (1)	2 (1)
Part-time	3.8 (4)	11.3	2.5 (2)	--
Casual	2.2 (5)	2.3 (4)	2.0 (1)	1 (1)
Average Payroll	$12,999	$104,406	$13,800	$525 (2)
Monthly Payroll per F.T.E. employee	$1,019	$1,907	$418	$156
Average Economic Impact Contribution	$24,449	$286,175* ($127,428)	$8,575	$712

* the above normal number is largely due to one business' figures (the number below excludes this same business).

( ) where the number of establishments reporting is significantly different from the sample size.

VANCOUVER ISLAND
RESTAURANT SECTOR

Winter Quarter, January - March 1988

Type	Restaurants	
Characteristics	Small (≤75 seats)	Large (>75 seats)
Sample size	6	6
Av. days of op. (91 day max.)	91	91
Average Number of seats	52	148
Meals served:		
Av. breakfasts	<25 (1)	25-49 (2)
Av. lunches	25-49 (3)	50-74
Av. dinners	25-49	100-149
Av. snacks	50-74	50-74 (2)
Employment Averages for:		
Full-time	6.7	20.2
Part-time	3.0	18.2
Casual	1.3 (3)	4.3 (3)
Average Payroll	$15,167	$76,283
Monthly Payroll per F.T.E. employee	$607	$1,103
Average Economic Impact Contribution	$7,368	$83,167* ($60,680)

( ) where the number of establishments reporting is significantly different from the sample size.

* the above normal number is largely due to one business' figures (the number below excludes this same business).

VANCOUVER ISLAND
ATTRACTIONS SECTOR

Winter Quarter, January - March 1988

Type	Marina and Boat Rentals
Sample size	5
Av. days of op. (91 day max.)	91
Av. Number of Customers	
January	250-499
February	250-499
March	500-749
Employment	
Averages for:	
Full-time	1.8
Part-time	1.0 (3)
Casual	1.0 (1)
Average Payroll	$10,000
Monthly Payroll per F.T.E. employee	$1,550
Average Economic Impact Contribution	$23,725

( ) where the number of establishments reporting is significantly different from the sample size.

		Region (Replies = 258) (Gp. Size = 2.8)	Vancouver Island (Replies = 1357) (Gp. Size = 2.8))
% of parties overnight in this region	=	88 %	
Av. No. of nights spent in this region	=	2.9 nights	
% of parties using Hotels/Motels in this region	=	50 %	58 %
Av. No. of nights spent in Hotels/Motels	=	2.7 nights	2.9 nights
% of parties staying with Friends/ Relatives in this region	=	2 %	14 %
Av. No. of nights spent with Friends/Relatives	=	2.0 nights	4.9 nights
% of parties using campgrounds in this region	=	27 %	13 %
Av. No. of nights spent in campgrounds	=	3.0 nights	5.5 nights
% of parties using B & B in this region	=	5 %	8 %
Av. No. of nights spent in B & B	=	2.0 nights	2.6 nights
C. ROUTE & MODE PATTERNS:			
Arriving via ferry	=	79 %	80 %
Arriving via Vancouver - Victoria ferry	=	26 %	35 %
Arriving via Vancouver - Nanaimo ferry	=	40 %	23 %
Arriving via commercial airline	=	7 %	9 %
Using car (own or rental) on V.I.	=	83 %	80 %

		Region (Replies = 258) (Gp. Size = 2.8)	Vancouver Island (Replies = 1357) (Gp. Size = 2.8)
Parties visiting:			
1. Victoria region	=	50 %	77 %
2. Duncan region	=	32 %	25 %
3. Nanaimo region	=	66 %	43 %
4. Alberni-Clayoquot region	=	100 %	32 %
5. Comox-Strathcona region	=	19 %	17 %
6. Mount Waddington region	=	7 %	5 %
7. Gulf Islands region	=	5 %	6 %

D. SPENDING PATTERNS ON VANCOUVER ISLAND:

Percentage of parties reporting on accommodation expenditure	=	92 %	77 %
Av. daily expenditure on accommodation	=	$60.81	$70.62
Percentage of parties reporting on gift spending	=	47 %	50 %
Av. daily expenditure on gifts	=	$25.66	$37.65
Percentage of parties reporting on restaurant spending	=	71 %	83 %
Av. daily expenditure in restaurants	=	$41.49	$51.23
Percentage of parties reporting on daily expenditure	=	100 %	99 %
Av. daily expenditure on V.I.	=	$144.88	$173.18
Daily expenditure per person	=	$51.70	$ 62.39

	Region (Replies = 258) (Gp. Size = 2.8)	Vancouver Island (Replies = 1357) (Gp. Size = 2.8)
E. PLANNING PATTERNS:		
Those using travel agent as an info. source =	9 %	13 %
Those using word of mouth as an info. source =	43 %	36 %
Those using mag./newspapers as an info. source =	21 %	15 %
Those who planned trip ahead by 1 week or less =	24 %	28 %
Those who planned trip ahead by 1-6 months =	61 %	59 %
Those who planned trip ahead by over 6 months =	13 %	10 %

Importance (and percent response) of following trip considerations:

	Rating	(%)	Rating	(%)
"SuperNatural" B.C. Adverts	Important	(34 %)	Important	(30 %)
Outdoor scenery	Very Imp.	(77 %)	Very Imp.	(62 %)
Nat./Prov. Parks	Very Imp.	(77 %)	Important	(47 %)
City Scenery	Important	(24 %)	Important	(39 %)
Local festivals & events	Important	(19 %)	Important	(21 %)
Cultural activities	Important	(22 %)	Important	(22 %)
"Canada: The World Next Door" Adverts	Important	(15 %)	Important	(19 %)

F. RATING OF THIS TRIP:

	Rating	(%)	Rating	(%)
Hotels/Motels	Good	(69 %)	Good	(73 %)
Restaurants	Good	(78 %)	Good	(85 %)
Tourist Attractions	Good	(76 %)	Good	(78 %)
Visitor Information Centres	Good	(79 %)	Good	(62 %)

	Region (Replies = 258) (Gp. Size = 2.8)		Vancouver Island (Replies = 1357) (Gp. Size = 2.8)	
	Rating	(%)	Rating	(%)
Service	Good	(85 %)	Good	(83 %)
Cleanliness	Good	(91 %)	Good	(92 %)
Friendliness	Good	(93 %)	Excellent	(93 %)

G. VISITOR CHARACTERISTICS

Parties containing children (0-18 yrs.)	26 %	28 %
Parties containing young adults (19-34 yrs.)	67 %	63 %
Parties containing middle-aged adults (35-54 yrs.)	81 %	80 %
Parties containing elderly adults (55 yrs.+)	51 %	52 %
Average annual household income level of visiting parties	= $40,000-$59,999	$40,000-$59,999
(response rate	= 96 %	95 %

H. VISITOR ORIGINS:

Vancouver Island	13 %	6 %
Rest of B.C.	40 %	29 %
Alberta	12 %	9 %
Ontario	12 %	7 %
Rest of Canada	4 %	5 %
	81 %	56 %
Washington State	3 %	12 %
Oregon	0 %	4 %
California	2 %	9 %
Rest of U.S.A.	9 %	13 %
	14 %	38 %
Overseas	3 %	4 %